

SENIORS' HOUSING REPORT

Alberta



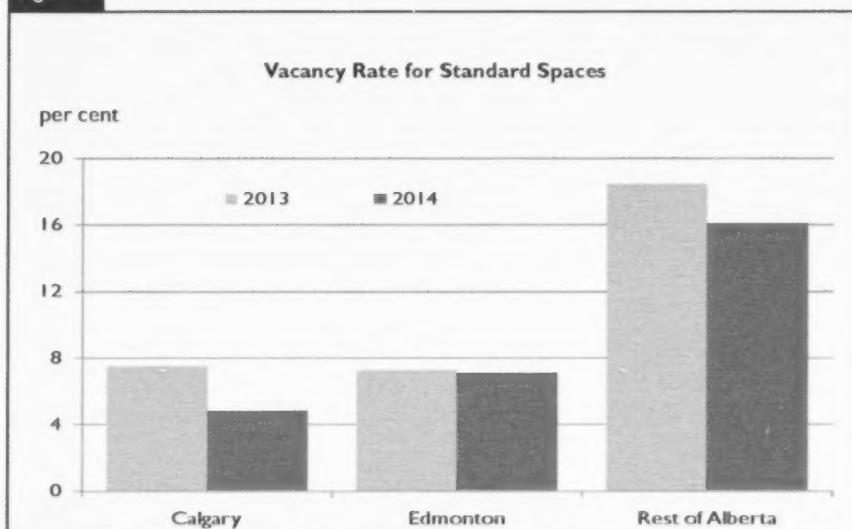
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2014

Highlights

- The overall vacancy rate for a standard space in retirement homes across Alberta was 8.5 per cent in 2014, compared to 10.2 per cent in 2013.
- In Alberta, the overall average rent for a standard space was \$2,826 per month in 2014, up from \$2,798 in 2013.
- The 2014 survey covered a universe of 10,463 standard and non-standard spaces that were home to 10,660 residents.

Figure 1



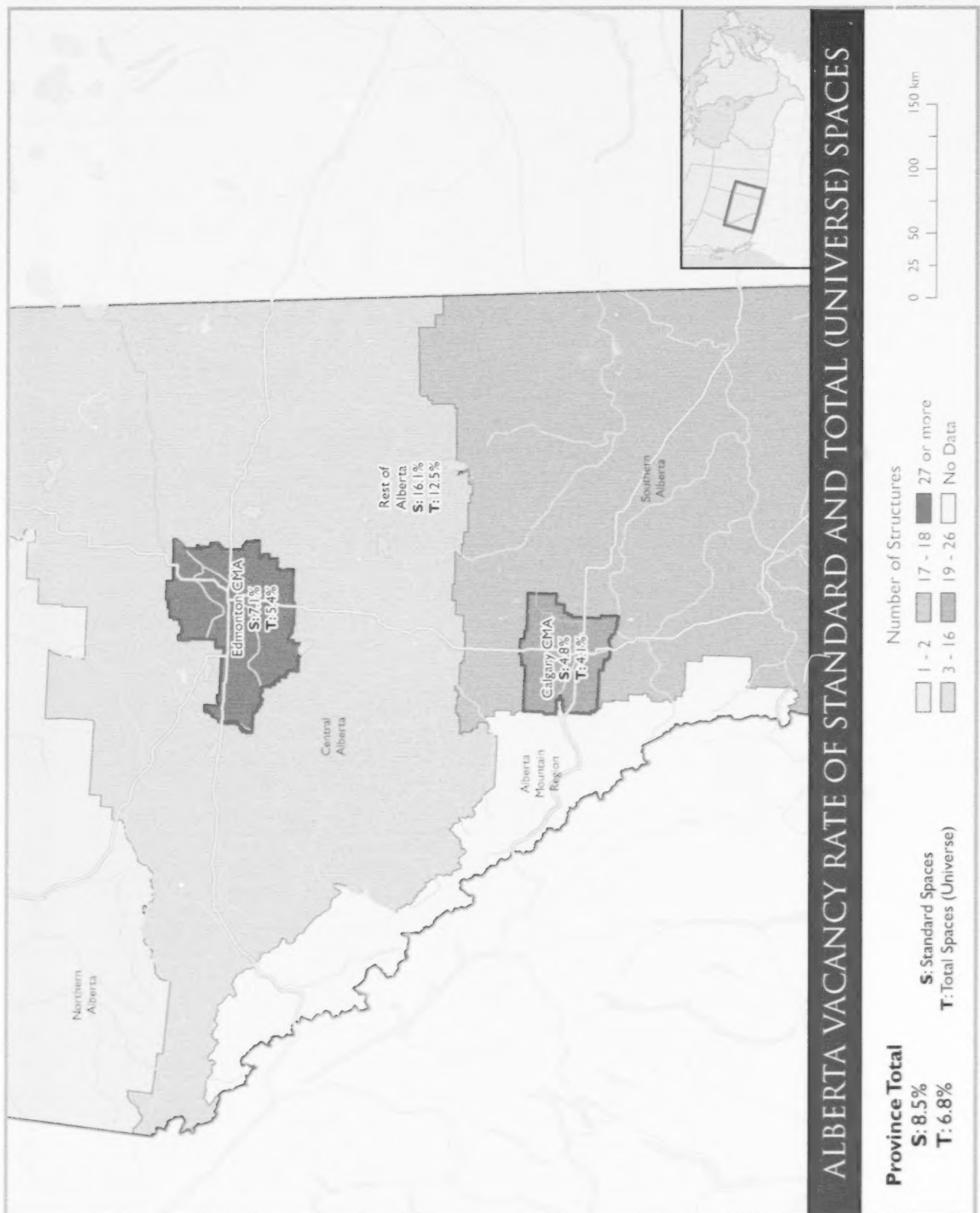
Source: CMHC

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Vacancy Rates

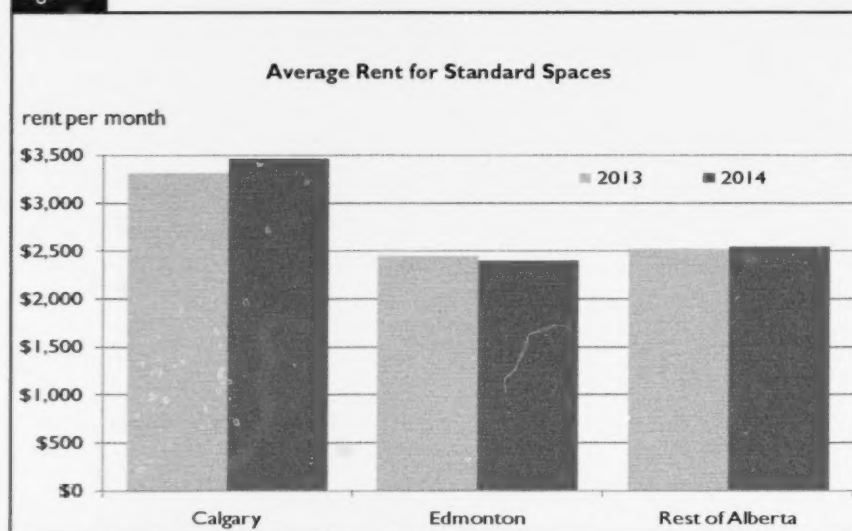
Vacancy rates decline in 2014

According to CMHC's survey of retirement homes in Alberta, the vacancy rate for standard retirement spaces declined to 8.5 per cent in 2014 from 10.2 per cent in 2013. In the Calgary Census Metropolitan Area (CMA), the vacancy rate was 4.8 per cent in 2014, down from 7.5 per cent one year prior. The vacancy rate also decreased in the Edmonton CMA, from 7.3 per cent in 2013 to 7.1 per cent in 2014. In the remainder of the province, the vacancy rate declined to 16.1 per cent from 18.5 per cent in 2013.

At the provincial level, bachelor units recorded the highest vacancy rate amongst standard spaces. This was also the only suite type where the vacancy rate increased, rising from 9.3 per cent in 2013 to 10.5 per cent in 2014. Standard spaces in suites with two or more bedrooms posted the lowest vacancy rate of 6.9 per cent. The vacancy rate for standard spaces in one-bedroom units declined from 10.9 per cent to 8.1 per cent.

In Calgary and Edmonton, the vacancy rate for a standard retirement space was lowest for those units with two or more bedrooms. The vacancy rate for this suite type was 1.5 per cent in Calgary and five per cent in Edmonton. In the Rest of Alberta, the vacancy rate for standard spaces was lowest among one bedroom units at 14.6 per cent. In each of the three segments, bachelor units posted the highest vacancy rate by bedroom size at 19.7 per cent. In Edmonton, the vacancy rate for standard spaces in bachelor units increased from

Figure 2



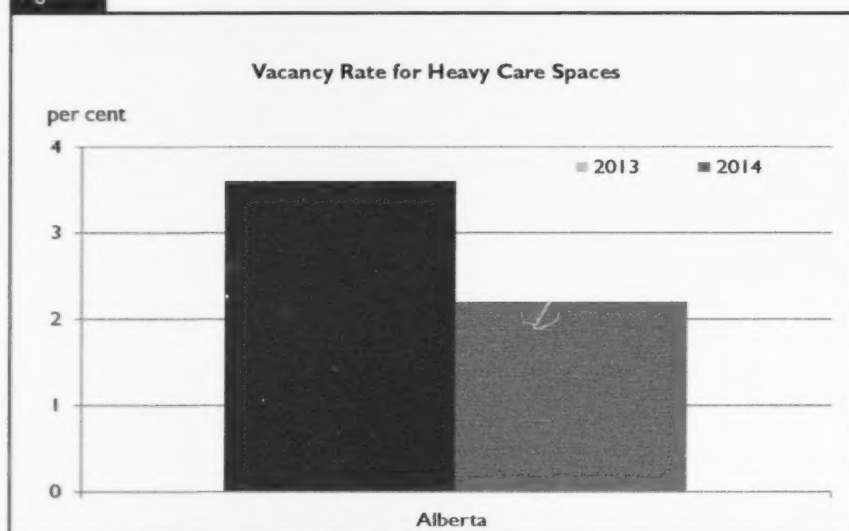
Source: CMHC

seven per cent in 2013 to 11.5 per cent in 2013. In Calgary and the Rest of Alberta, the vacancy rates for bachelor units were 5.8 per cent and 19.7 per cent, respectively.

Vacancy rates across Alberta were lowest among standard spaces renting for more than \$3,000. The vacancy rate for these spaces declined from 9.8 per cent in 2013 to 6.5 per cent in

2014. Standard spaces renting for less than \$1,500 a month, which previously recorded the lowest vacancy rate, recorded an increase in the vacancy rate from 4.9 per cent in 2013 to 8.5 per cent in 2014. The highest vacancy rate was once again found in spaces renting between \$1,500 and \$1,999 at 12.6 per cent.

Figure 3



Source: CMHC

Vacancy rate of heavy care spaces move lower

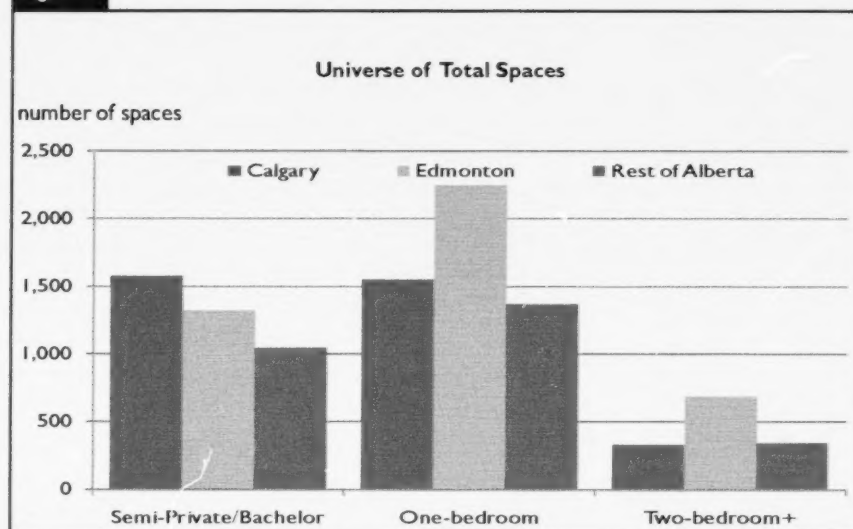
Heavy care spaces are classified as spaces in seniors' residences where the residence provides 1.5 hours or more of health care per day to the resident. The vacancy rate for these types of spaces in Alberta declined from 3.6 per cent in 2013 to 2.2 per cent in 2014. In Calgary, the vacancy rate for heavy care spaces decreased from 4.9 per cent in 2013 to 0.8 per cent in 2014. Edmonton recorded a smaller decline from 2.3 per cent to 1.2 per cent. In areas outside of these two cities, the vacancy rate for heavy care spaces was five per cent in 2014 compared to 4.7 per cent in 2013.

Universe of Retirement Spaces

CMHC's seniors' housing survey covered 10,463 retirement spaces in 2014, up three per cent from 10,160 in 2013. These spaces were spread across 96 residences, and included 10,660 residents. The capture rate¹ for the survey was 5.2 per cent in 2014 compared to 5.1 per cent in 2013. The majority of the identified retirement spaces in the survey, at 6,891, were standard spaces. Non-standard spaces amounted to 2,306, these included heavy care spaces, non-market or rental subsidy spaces, and some spaces being used to provide respite care.

Almost one-third of all retirement spaces in Alberta were located in Calgary, while spaces in Edmonton accounted for 41 per cent of the provincial total. Residences in Calgary and Edmonton tended to be

Figure 4



Source: CMHC

larger with more spaces than those in smaller areas. There was an average of 133 spaces in residences in Calgary and 125 in Edmonton. In the remaining areas of the province, residences averaged 77 spaces.

Spaces in one-bedroom units remained the most common in Alberta. These units accounted for almost half of all spaces in the province. Semi-private/bachelor units accounted for the second highest number of spaces in the universe at 38 per cent. The remaining 13 per cent of spaces were in units with two or more bedrooms.

Semi-private/bachelor spaces were more common in Calgary than in other areas of the province and accounted for the largest share across unit types at 46 per cent. Outside of Alberta's two major cities, spaces in one-bedroom units were the most common.

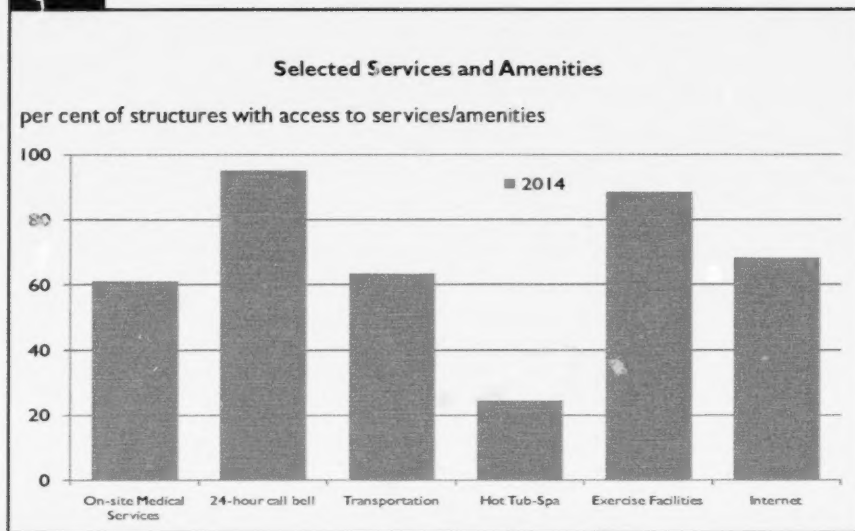
Services and Amenities

Seniors' residences typically offer many other services not found in the purpose-built rental market. Some of the services and amenities may include meal plans, on-site medical services, housekeeping, laundry and recreational programs. CMHC's Seniors' survey included residences that provided at least an on-site meal plan. Almost two-thirds of the residences surveyed had a mandatory meal plan that included all three meals. The most common amenity in Alberta was a 24-hour call bell found in 95 per cent of structures surveyed, followed by an exercise facility found in 89 per cent of structures.

While a 24-hour call bell service and an exercise facility were found in a high proportion of structures across Alberta, there were some amenities that were more common in some

¹ The capture rate is the proportion of the population aged 75 and over living in the survey universe.

Figure 5



Source: CMHC

centres compared to others. For instance, transportation services were offered in 92 per cent of structures in Calgary compared to an average of 54 per cent in the Rest of Alberta. Calgary structures also reported more structures with internet access at 83 per cent while the Rest of Alberta was at 64 per cent.

Rents

Average Rent for Standard Units

The average rental rate for a standard space in Alberta was \$2,826 per month in 2014 for all bedroom types, compared to \$2,798 in 2013. Rental rates for Seniors' residences are typically higher than rents in the purpose-built rental market due to the additional services and amenities that are also included. Bachelor and one-bedroom units reported an average rent of \$2,315 and \$2,866 per month, respectively, both up from the previous year. Units with two-bedrooms or more had an average rent of \$3,442 in 2014, down from

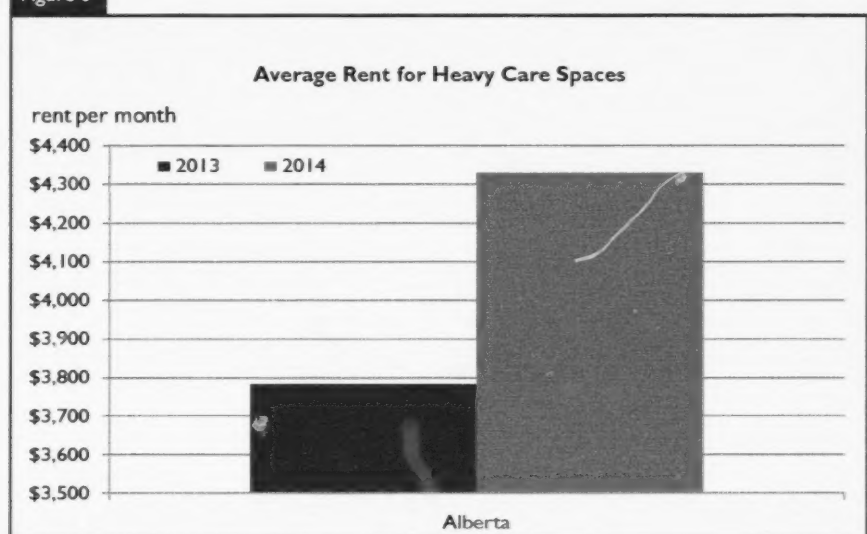
\$3,533 in 2013.

Calgary had the highest overall average rent for standard spaces compared to Edmonton and the Rest of Alberta. The average rent in Calgary for all bedroom types was \$3,460 in 2014 compared to \$2,402 in Edmonton and \$2,544 in the Rest of Alberta. Among these three areas, Calgary and the Rest of

Alberta reported an increase in the total average rent while Edmonton reported a decline. The average two-bedroom and larger units in Edmonton rented for \$2,910 in 2014, down from the previous year of \$3,151. Edmonton's two-bedroom and larger rent was also lower than in Calgary which was at \$4,466 and the Rest of Alberta at \$3,346. Bachelor units in Calgary, Edmonton, and the Rest of Alberta reported a higher average rent in 2014 compared to 2013. For one-bedroom units, the average rent in 2014 increased in Calgary and the Rest of Alberta, to \$3,625 and \$2,546, respectively.

The proportion of standard spaces in Alberta increased with higher rents. For instance, six per cent of standard spaces in the total universe had an average rent of \$1,500 or less per month in Alberta, while 39 per cent of spaces reported an average rent of \$3,000 or more. In Calgary, 70 per cent of standard spaces recorded an average rent of \$3,000 or more while in Edmonton the proportion was 19 per cent. Standard spaces renting for \$3,000 or more in the rest of

Figure 6



Source: CMHC

Alberta accounted for 26 per cent of all standard spaces. Conversely, the proportion of units in the rent range of \$1,500 or less was 15 per cent in Edmonton, higher than both Calgary and the Rest of Alberta. For Edmonton, the rent range between \$2,500 and \$2,999 captured the highest proportion of spaces at 32 per cent followed by 21 per cent in the rent range of \$2,000 to \$2,499. The highest proportion of standard spaces by rent range for the Rest of Alberta was 31 per cent of the total universe in the \$2,000 to \$2,499 rent range.

Average Rent for Heavy Care Spaces

The average rent for a heavy care space in Alberta was \$4,329 per month in 2014, up from \$3,784 in 2013. Heavy care spaces typically include more health care services compared to standard spaces, contributing to a higher average rent. In Edmonton, the average rent for a heavy care space was \$4,295 in 2014, up from \$3,905 in 2013.

TABLES INCLUDED IN THE ALBERTA SENIORS' HOUSING REPORT

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type**Alberta**

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
Calgary CMA	**	**	6.0	5.8	9.5	5.0	2.7	1.5	7.5	4.8
Edmonton CMA	**	**	7.0	11.5	6.9	6.5	8.6	5.0	7.3	7.1
Rest of Alberta	**	**	19.8	19.7	18.1	14.6	18.0	17.5	18.5	16.1
Alberta	**	**	9.3	10.5	10.9	8.1	9.3	6.9	10.2	8.5

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates (%) of Standard Spaces by Rent Range (\$)**Alberta**

Centre	Less than \$1,500		\$1,500 - \$1,999		\$2,000 - \$2,499		\$2,500 - \$2,999		\$3,000 and more		Total where rents are known	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
Calgary CMA	**	**	0.0	**	3.9	4.5	11.3	9.8	7.0	3.8	7.5	4.8
Edmonton CMA	4.7	**	10.4	8.8	6.2	6.6	7.8	7.1	7.2	7.8	7.3	7.3
Rest of Alberta	6.0	**	20.1	17.5	16.2	14.8	16.5	16.1	25.3	15.8	18.5	16.2
Alberta	4.9	8.5	14.1	12.6	10.0	9.0	10.9	10.0	9.8	6.5	10.2	8.6

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

1.3 Vacancy Rates (%) and Average Rents (\$) of Heavy Care Spaces¹**Alberta**

Centre	Vacancy Rate		Average Rent	
	2013	2014	2013	2014
Calgary CMA	4.9	0.8	3,774	**
Edmonton CMA	2.3	1.2	3,905	4,295
Rest of Alberta	4.7	5.0	**	**
Alberta	3.6	2.2	3,784	4,329

¹ Non-market heavy care units are excluded from Average Rents, but are included in Vacancy Rate.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)**Alberta**

Centre	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+ ¹	Capture Rate ² (%)
		2013	2014				
Calgary CMA	3,450	6.9	4.1	26	3,645		
Edmonton CMA	4,256	5.4	5.4	34	4,367		
Rest of Alberta	2,757	14.8	12.5	36	2,648		
Alberta	10,463	8.3	6.8	96	10,660	203,500	5.2

¹ Source: Table 11-10, Population by age group and sex, medium-growth - historical trends (1981 to 2008) scenario (M1) July 1st - Alberta, 2010 to 2036. Statistics Canada - Catalogue no. 91-520-X

² The capture rate is the proportion of the population aged 75 and over living in the survey universe.

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2.1 Universe of Total Spaces by Unit Type Alberta

Centre	Semi Private/ Bachelor	One Bedroom	Two Bedroom +	Total
Calgary CMA	1,575	1,545	330	3,450
Edmonton CMA	1,321	2,245	690	4,256
Rest of Alberta	1,045	1,368	344	2,757
Total Alberta	3,941	5,158	1,364	10,463

2.2 Universe by Unit Type Alberta

Centre	Semi Private/ Bachelor	One Bedroom	Two Bedroom or more	Total
Calgary CMA	1,575	1,545	330	3,450
Standard Spaces	841	1,453	323	2,617
Non-Standard Spaces	483	62	-	545
Unknown Spaces	251	30	7	288
Edmonton CMA	1,321	2,245	690	4,256
Standard Spaces	487	1,456	563	2,506
Non-Standard Spaces	645	323	7	975
Unknown Spaces	189	466	120	775
Rest of Alberta	1,045	1,368	344	2,757
Standard Spaces	372	1,105	291	1,768
Non-Standard Spaces	554	204	28	786
Unknown Spaces	119	59	25	203
Alberta	3,941	5,158	1,364	10,463
Standard Spaces	1,700	4,014	1,177	6,891
Non-Standard Spaces	1,682	589	35	2,306
Unknown Spaces	559	555	152	1,266

2.3 Universe of Standard Spaces by Rent Range (\$) Alberta

Centre	Less than \$1,500	\$1,500 - \$1,999	\$2,000 - \$2,499	\$2,500 - \$2,999	\$3,000 and more
	% of Total ¹	% of Total ¹	% of Total ¹	% of Total ¹	% of Total ¹
Calgary CMA	0.1	0.1	14.4	15.6	69.7
Edmonton CMA	14.5	13.9	21.2	31.7	18.7
Rest of Alberta	2.4	17.4	30.8	23.9	25.5
Alberta	6.2	9.7	21.1	23.9	39.2

¹ % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

The following letter codes are used to indicate the reliability of the estimates:

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2.4 Proportion (%) of Structures where Select Services are Available¹ by Structure Size Alberta

Centre	Meals				On-Site Medical Services	On-Site Nursing Services ¹	24-hour call bell	Pharmacy
	Optional	# included in rent						
		1	2	3				
Calgary CMA	0.0	12.5	0.0	79.2	0.0	0.0	95.8	0.0
10 - 49	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
50 - 89	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
90 or more	0.0	13.6	4.5	81.8	0.0	0.0	95.5	0.0
Edmonton CMA	0.0	0.0	0.0	0.0	0.0	0.0	92.6	0.0
10 - 49	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
50 - 89	0.0	0.0	0.0	0.0	0.0	0.0	100.0	0.0
90 or more	0.0	0.0	0.0	0.0	0.0	0.0	90.5	0.0
Rest of Alberta	0.0	0.0	5.6	73.2	63.3	0.0	97.2	5.6
10 - 49	0.0	0.0	0.0	0.0	0.0	0.0	84.0	16.0
50 - 89	0.0	0.0	11.7	68.4	75.4	0.0	100.0	5.8
90 or more	0.0	7.9	0.0	92.1	0.0	0.0	100.0	0.0
Alberta	1.3	25.8	9.6	63.3	61.1	50.5	95.2	10.3
10 - 49	0.0	0.0	0.0	0.0	0.0	0.0	88.6	11.4
50 - 89	0.0	0.0	0.0	0.0	0.0	0.0	100.0	8.6
90 or more	0.0	24.8	5.7	67.5	58.2	56.0	94.3	10.9

¹ Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

² On-site nursing services include RN, RPN or LPN.

2.5 Proportion (%) of Structures with Access to Selected Amenities¹ by Structure Size Alberta

Centre	Transportation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Calgary CMA	91.7	12.5	0.0	62.5	100.0	83.3
10 - 49	0.0	0.0	0.0	0.0	0.0	0.0
50 - 89	0.0	0.0	0.0	0.0	0.0	0.0
90 or more	95.5	13.6	0.0	63.6	100.0	86.4
Edmonton CMA	0.0	0.0	0.0	0.0	85.2	0.0
10 - 49	0.0	0.0	0.0	0.0	0.0	0.0
50 - 89	0.0	0.0	0.0	0.0	0.0	0.0
90 or more	0.0	0.0	0.0	0.0	90.5	0.0
Rest of Alberta	54.2	0.0	0.0	0.0	83.3	62.8
10 - 49	0.0	0.0	0.0	0.0	0.0	84.0
50 - 89	0.0	0.0	5.8	0.0	88.3	0.0
90 or more	0.0	0.0	0.0	0.0	100.0	74.7
Alberta	63.5	6.0	24.6	43.4	88.5	68.4
10 - 49	0.0	0.0	0.0	0.0	0.0	0.0
50 - 89	0.0	0.0	4.1	0.0	86.6	0.0
90 or more	78.9	0.0	0.0	0.0	96.0	77.7

¹ Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

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a - Excellent, b - Very good, c - Good, d - Fair (Use with Caution)

0.0 - Suppressed to protect confidentiality

++ - Not statistically reliable

-- - No units exist in universe for this category

3.1 Average Rent (\$) of Standard Spaces by Unit Type**Alberta**

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
Calgary CMA	**	**	2,622	2,789	3,506	3,625	4,321	4,466	3,314	3,460
Edmonton CMA	**	**	1,817	1,855	2,419	2,408	3,151	2,910	2,450	2,402
Rest of Alberta	**	**	1,874	1,905	2,530	2,546	3,355	3,346	2,525	2,544
Alberta	**	**	2,228	2,315	2,839	2,866	3,533	3,442	2,798	2,826

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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O1 Building Structure Makeup (%)**Alberta**

Centre	Concrete Frame	Wood Frame
Calgary CMA	34.6	65.4
Edmonton CMA	55.9	44.1
Rest of Alberta	25.0	75.0
Alberta	38.5	61.5

O2 Ancillary Services, Cable and Telephone and Optional Costs (% of residences)**Alberta**

Centre	Services	Included in Rent (%)	Tenant Arrange (%)	Optional (%)	Average Cost if Optional (\$)
Calgary CMA	Cable	42.3	38.5	19.2	**
	Telephone	7.7	69.2	23.1	**
Edmonton CMA	Cable	61.8	29.4	8.8	**
	Telephone	8.8	79.4	11.8	**
Rest of Alberta	Cable	36.1	36.1	27.8	31.80
	Telephone	8.3	69.4	22.2	37.00
Alberta	Cable	46.9	34.4	18.8	37.00
	Telephone	8.3	72.9	18.8	37.72

O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened**Alberta**

Centre	Before 1990	1990 - 1999	2000 or later	Total
Calgary CMA	**	4.6	4.6	4.8
Edmonton CMA	**	3.9	7.7	7.1
Rest of Alberta	**	**	15.9	16.1
Alberta	7.6	6.9	9.1	8.5

O4 Average Rents (\$) of Standard Spaces by Date Residence Opened Alberta

Centre		Before 1990	1990 - 1999	2000 or later	Total
Calgary CMA	Semi Private	++	++	++	++
	Bachelor	++	3,021	2,714	2,789
	One Bedroom	++	3,652	3,568	3,625
	Two Bedroom +	++	4,831	4,278	4,466
	All	++	3,511	3,459	3,460
Edmonton CMA	Semi Private	++	++	++	++
	Bachelor	++	2,502	1,855	1,855
	One Bedroom	++	2,736	2,477	2,408
	Two Bedroom +	++	3,351	2,918	2,910
	All	++	2,753	2,538	2,402
Rest of Alberta	Semi Private	++	++	++	++
	Bachelor	++	++	1,794	1,905
	One Bedroom	++	++	2,515	2,546
	Two Bedroom +	++	++	3,296	3,346
	All	++	++	2,540	2,544
Alberta	Semi Private	++	++	++	++
	Bachelor	2,017	2,642	2,277	2,315
	One Bedroom	2,439	3,083	2,869	2,866
	Two Bedroom +	++	3,974	3,368	3,442
	All	2,315	3,018	2,867	2,826

The following letter codes are used to indicate the reliability of the estimates:

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Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe.

To be eligible for inclusion in the survey results, a residence must:

- ✓ have at least one unit that is not subsidized;
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2012 to be included in the 2013 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its residents; nursing homes and long-term care homes are examples of residences that were not included in the survey;
- ✓ offer rental units; life lease units and owner-occupied units are excluded from this survey; and
- ✓ have at least 50 per cent of its residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey; therefore, all seniors' residences in Canada meeting these criteria are to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e-mail responses. Information was obtained from the residence owner, manager or administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data, please click [here](#).

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases, a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard space: A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy care space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

Respite space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or subsidy space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: The actual amount a resident pays per month for his or her accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement

The Seniors' Housing Survey could not have been conducted without the co-operation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality

All information provided through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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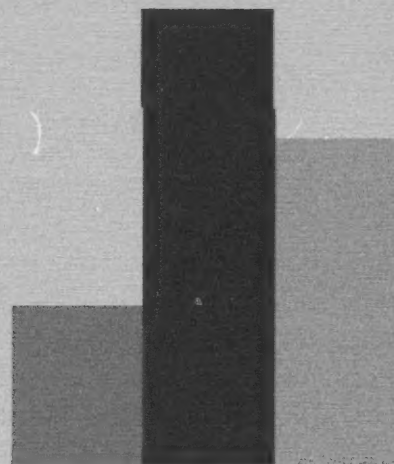
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